Preservation Actions,
MARC 21 Field 583, and
Communal Local Holdings Records in OCLC WorldCat

Problem: Over the past few years, with the increased focus on Web-based resources, the shifting priorities for the use of space, and diminished budgets, many libraries have begun to re-assess their commitment to retention of print collections. Particularly at risk are specialized journals with a limited readership and humanities journals distributed only in print. A cooperative strategy for disclosing commitments and actions (begun under the Cooperative Collection Management Trust or CCMT) is needed to address this critical problem.[1]

Since MARC21 already has a 583 field defined for another type of activity--preservation and digital actions, or PDA--OCLC proposes to extend the existing guidelines and define an 042 authentication code to identify records carrying 583 data. OCLC proposed that the 583 data be added to bibliographic records.

ISSUES:
* The bibliographic record is a convenient place for 583 data if it is to be useful for search and discovery to support Cooperative Collection Management Trust (CCMT) activities, but it is very difficult to edit bibliographic records within cataloging workflows.

* When 583s are created in the bib record, showing specific institutional commitments requires adding many 583 fields to the record (at least one per institution or consortium)

* The 583 fields will be fairly verbose, because they will have to include subfields that scope them to various institutional details.

* Editing the bib records is limited to (scarce, thus, expensive) CONSER level catalogers. While these issues are manageable in the monographic world, they compound rapidly for serials.

SUMMARY OF SITUATION:
1. Libraries have a need to share information at the network level concerning the preservation actions committed to/taken on monographic and serial resources.

2. Historically this data has been encoded in the MARC 583 field. The proposed range of subfields available, together with applicable controlled vocabularies, would extend the use to cover CCMT activities.

3. The repeated instances of the 583 field, needed when multiple actions are taken by multiple institutions, will put considerable pressure on a bibliographic record, particularly if it represents a multi-volume title.

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[1] Information from Malpas, 2009a & 2009b

4. Current availability of LHR data displays in Connexion and FirstSearch[2] , as well as emerging WorldCat Local-related initiatives to improve LHR batchload capabilities, warrants serious renewed consideration of LHR usage for 583 fields.

RECOMMENDATION:
The institution-specific nature of the data in the 583 fields, reflecting how it is held versus describing all copies, points to preferring use of the holdings format. A communal LHR would make it much easier to see at a glance for which volumes of a serial title at least one institution has taken an action or made a preservation commitment.

POSSIBLE BONUS W/PROPOSAL: An LHR scoped 583 would be more amenable to collecting more types of preservation data, and could use locally created/ILS-based templates to facilitate this. At present, this field is under-utilized in this regard and preservation documentation is very hard to come by. Libraries could take a leadership position among the lib, archive, museum ("LAM") sector by sharing this type of info. LAM collaboration is an interest of RLG, and preservation/conservation is one of the big common interests of those groups.

ASPECTS OF THE COMMUNAL LOCAL HOLDINGS RECORD:

A. What purpose(s) would the 583 data serve? In which cases is the information desired at the network level by collection managers?
   1. Preservation actions
   2. Preservation commitments
   3. Both of the above
   4. Condition reports (probably not needed at the network level)

B. Which record(s) should the 583 fields be associated with?
   1. Format options
      a. Associate holdings for all formats with the print version record whenever one exists. [This would make it possible to see in one place all preservation actions related to a particular volume, whether a print version has been digitized, an e-serial is backed up by a print copy placed in a dark archive, etc.]
      b. Utilize the record for the original format of the material being preserved.
      c. Utilize the record reflecting the format of the preservation copy.

   2. Title change options
      a. Successive entry records [Holdings data normally conforms to the date spans of the associated bibliographic record.]
      b. Latest entry record [Holdings for serial runs would all be in one place, though the holdings of network-level interest would have to be moved occasionally from one bibliographic record to another]
      c. Earliest entry record [Holdings for serial runs would all be in one place and would not need to be moved when titles change]

C. What would it be like to view data contained in a "communal LHR"?

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[2] To see an example of LHR display, ISSN 1684-7636 can be searched in FirstSearch and Connexion

1. One would read down through an accumulation of contributed 583 fields, sorted by volume number (beginning volume, if a range) or sorted by MARC 21 institution symbol.
2. Same as 1., but there would be separate groupings for preservation actions and for preservation commitments.
3. A "composite" holdings statement (probably in an 866 field) would also accompany either 1. or 2. above. In greatest-common-denominator fashion, the statement would include any volume featured in any individual institution's preservation action. [This summary statement would enable interested parties to view, not just within a single LHR but in a single *field* in that LHR, what volumes have had some preservation action taken or commitment made.]

D. How would the "composite" holdings statement get built?
   1. Manually, when edited by each institution that is also contributing 583 fields.
   2. Automatically, perhaps through an API that acts on 583 field data that are consistently coded to standards.

E. How would the "communal LHR" be constructed and managed?
   1. A new OCLC symbol would be defined to represent network-level preservation data associated with a particular title. The symbol would be set on any bibliographic record associated with an LHR containing 583 fields from multiple institutions. Edit capability for that new symbol would be available to numerous OCLC members through wide distribution of authorization numbers tied to that symbol. Editors would add, change, or delete 583 fields only for their own institution, taking care with the 866 and all other fields.

   2. OCLC members, using existing authorization numbers, would add 583s to institution-specific LHRs in WorldCat (or batchload them from local systems to WorldCat). The "communal LHR" would be built after-the-fact by a data-mining strategy that searches for certain terms in the subfield $a's of accessible 583 fields. The new OCLC symbol in 1. would be automatically assigned to the bib record when the LHR was created and attached. No one, aside from OCLC staff and perhaps a few select other institutions, would need to have direct edit capability on the "communal LHRs." [Data security would be less of a concern. Switching among different authorization numbers tied to different holdings symbols could be avoided. Workflow options of creating and maintaining LHRs in WorldCat or batchloading from local systems might be preserved with this option.]

F. How would WorldCat bibliographic records be flagged to indicate that network-level preservation data was tied to them and available for viewing?
   1. The new OCLC symbol described in E above would be added to applicable records. Those records would thus retrievable by the symbol in any search that included "li:[XXX]," where "XXX" represents the new symbol.

   2. A new 042 field code could be defined to signify that the bib record has a relevant LHR is attached.

   3. A generic 583 that essentially says "Network-level preservation data about this title is available."

G. Will the data in 583 fields be just as readily indexed in an LHR as it now is within a bibliographic record?

As part of WorldCat Local development, OCLC is actively investigating how local data can be indexed within LHRs, e.g. local title and name added entries. The question of indexing of 583 field data could be brought to their attention.

H. How can data entry in 583 fields be streamlined?
   1. Record-by-record: Macros.
   2. Batch-load from local systems [added]

I. What services could be built on this data in addition to record discovery?
   1. Institutional Reports
   2. Workflows-based portal (e.g., with pre-set filters on WorldCat data and templates for data entry), to assist preservation staff and selectors to discover, interpret, share data.
   3. Other?

Discussion Questions for CONSER Operations Committee Meeting

1. Does the case for "communal LHRs" for network-level preservation data appear sufficiently compelling, such that the idea should be further pursued with OCLC?

2. Do the options available under the Issues above make the "communal LHR" approach seem feasible and worthy of further investigation?

Appendices

1. Background

For over 10 years, various groups have been discussing collaborative solutions to the problem of physical storage and management of print materials. In 2006, OCLC surveyed 500 member libraries to ascertain interest in a systemwide approach to managing print collections. This was followed in June 2007 by OCLC's launching of the Cooperative Collection Management Trust (CCMT), a group concerned with the need to reduce the costs and space associated with physical storage and management of print materials while maintaining access to the content.

Between 2007 and 2008, OCLC conducted a collection analysis project in conjunction with the CCMT. One outcome of this project was a proposal to use the MARC 583 Action note to record local print archiving commitments. This field is already being used by the preservation community to record preservation and digital actions (PDA). The hope would be that CCMT use of the 583 field would be compatible.

In December 2008, Constance Malpas hosted a conference call with a group of Preservation Officers and CONSER representatives to discuss the use of the 583 field in CONSER bibliographic records for serials. Constance Malpas summarized the discussion in January 2009, during the CONSER at Large meeting at ALA Midwinter. Following the discussion Constance Malpas made available for comment a draft document "Guidelines for Use in Print Archiving."

This discussion was followed in late February by an announcement to various University of California groups that OCLC was exploring with the California Digital Library the use of data from JSTOR records to add 583 field data to OCLC serial bibliographic records, including CONSER records. The Associate University Librarians at UC campuses endorsed the idea, with some caveats.

At the end of March, UC San Diego responded to the announcement with detailed comments regarding the proposal; the message ended with the comment, "We know that storing this data in the Local Holdings Record has been proposed, and encourage continuing to look at this technique as a possible solution."

Additional information is available at:
"Cooperative Collection Management Trust (CCMT) Pilot": http://www.oclc.org/productworks/ccmt.htm
Malpas, Constance. 2009a. Shared print policy review report. Dublin, Ohio: OCLC Programs and
    Research. http://www.oclc.org/programs/publications/reports/2009-03.pdf
Malpas, Constance. 2009b. Preservation at the network level: challenges, opportunities. Powerpoint
    presentation given at ALA Midwinter: http://www.slideshare.net/RLGPrograms/preservation-at-the-
    network-level-challenges-opportunities-presentation
"MARC 21 field 583 (action note): draft guidelines for use in print archiving" (GoogleDocs)
    http://docs.google.com/Doc?id=dc2djpm6_46cbq4kfgd
    http://docs.google.com/Doc?id=dc2djpm6_46cbq4kfgd&invite=rj3mmv (with comments)
Network Development and MARC Standards Office, Library of Congress. "Standard terminology for the
    MARC 21 actions note field" http://www.loc.gov/marc/bibliographic/stmanf.html
Preservation & digitization actions: terminology for MARC 21 Field 583
    http://www.loc.gov/marc/bibliographic/pda.pdf
Registry of Digital Masters: CONSER discussions: http://www.loc.gov/acq/conser/Reg-Dig-Masters-
    summary.pdf , http://www.loc.gov/acq/conser/CONSER-opco-summary-2008.pdf

Pertinent email messages: Les Hawkins (1/23/2009); Emily Stambaugh (2/4/2009)

2, Sample Record from "MARC 21 Field 583 (Action Note)" Document

>007   c $b r $d c $e n $f u
>010   59031498
>040   DLC $c DLC $d OCL $d NSD $d OCL $d AIP $d HUL $d AIP $d OCL $d NSD $d DLC $d AGL $d
NSD $d NST $d NSD $d NST $d HVL $d PIT $d GUA $d DLC $d CUS $d IUL $d OCL $d SYS $d OCL
$d NLM $d OCLCQ $d MYG $d OCLCQ $d HNK $d NLGGC $d LVB
>012   u $d 7 $e - $f - $g p $h - $i 8408 $k 1 $m 1
>016 7 100968784 $2 DNLM
>019   1754626 $a 185058475
>022 0 0022-1821 $2 z
>030   JIEOAF
>032   000154 $b USPS
>042   lc $a nsdp **$a par**
>050 00 HD1 $b .J6
>050 14 HD2326 $b .J68
>051   http://www.jstor.org/journals/00221821.html $c ELECTRONIC COPY
>070 0 HD1.J6
>082   338.05
>090 $b
>049   OCLC
>210 0 J. ind. econ.
>222 4 The Journal of industrial economics
>245 04 The Journal of industrial economics.
>260   Oxford, Eng., $b Blackwell.
>300 $c 22 cm.
>310   Quarterly
>362 0 v. 1- Nov. 1952-
>530   Also available via World Wide Web and on microfiches.
>530   Also issued online.
>583 1 $3 v.1-48(1952/1953-2000) $a committed to archive $c 2008-06-30 $l access restricted $u
http://www.srlf.ucla.edu/Jstor/default.aspx $z UC JSTOR print archive $2 pda $5 CLU-L
>583 1 $3 v.1-48(1952/1953-2000) $a transferred to optimal storage $c 2008-06-30 $u
http://www.srlf.ucla.edu/Deposit/OpPrinciples/RLFopPrinciples.pdf $z SRLF $z access restricted
to UC faculty, staff, students and JSTOR $2 pda $5 CLU-L
>583 1 $3 v.1-48(1952/1953-2000) $a condition reviewed $c 2008-06-30 $l undamaged $i page
validated $u http://www.srlf.ucla.edu/Jstor/titleDetails.aspx?titleid=449 $2 pda $5 CLU-L
>583 1 $3 v.1-v.42 (1952-1994) $a committed to archive $c 20031106 $z CRL Distributed Print
Archive $l access subject to prevailing inter-lending policy $u
http://www2.lib.msu.edu/contact/request-remotestorage.jsp $2 pda $5 MiEM
>583 1 $3 v.1-v.42 (1952-1994) $a transferred to optimal storage $c 20031106 $u
http://www.crl.edu/JSTORTitles/PDFs/MSU_Contract.pdf $z CRL Distributed Print Archive $2 pda
$5 MiEM
>583 1 $3 v.1-v.42 (1952-1994) $a condition not reviewed $c 2003-11-30 $2 pda $5 MiEM
>583 1 $3 Vol. 1, 1952/1953- $a committed to archive $c 2008-09-2-30 $l access subject to
prevailing inter-lending policy $u http://www.bl.uk/reshelp/atyourdesk/docsupply/index.html $z
UKRR $2 pda $5 Uk
>583 1 $3 Vol. 1, 1952/1953- $a condition reviewed $c 2008-11-30 $i issue validated $l undamaged
$z UKRR $2 pda $5 Uk
>650 0 Industrial organization (Economic theory) $v Periodicals.
>650 17 Industrie. $2 gtt
>650 6 Économie industrielle $v Périodiques.
>776 1 $t Journal of industrial economics (Online) $w (DLC)sn 98023004 $w (OCoLC)38170137
>776 1 $c Microfiche $x 0022-1821 $w (OCoLC)17786297
>850   CaMWUC $a DLC $a GU $a IaU $a InU $a MH-KG $a MoSU $a PPiU
>856 41 $u http://www.jstor.org/journals/00221821.html

>856 4 $u http://firstsearch.oclc.org $z Address for accessing the journal using authorization number and password through OCLC FirstSearch Electronic Collections Online. Subscription to online journal required for access to abstracts and full text
>856 4 $u http://firstsearch.oclc.org/journal=0022-1821;screen=info;ECOIP $z Address for accessing the journal from an authorized IP address through OCLC FirstSearch Electronic Collections Online. Subscription to online journal required for access to abstracts and full text
>856 41 $u http://www.blackwell-synergy.com/rd.asp?goto=journal&code=joie
>891 12 $9 853 $8 1 $a v. $b no. $u 3 $v r $i (year/year) $j (month) $w t $x 11
>891 40 $9 863 $8 1 $a <1>- $i <1952/1953>- $x provisional
>891 22 $9 853 $8 2 $a v. $b no. $u 4 $v r $i (year/year) $j (month) $w q $x 09
>891 40 $9 863 $8 2 $a <22>- $i <1973/1974>- $x provisional
>936   unknown $a Dec. 1980
>029 1 NLM $b 100968784
>029 1 NLGGC $b 830736298
>029 1 NZ1 $b 4335308
>029 1 AU@ $b 000000892850
>029 1 AU@ $b 000022671079
>029 1 AU@ $b 000025086032
>029 1 AU@ $b 000010566069

This record represents a composite of information from several sources. Text in color [marked in a rectangular box] represents additions made to a source record from WorldCat. Range-specific institutional commitments have been derived from public sources of information regarding various distributed print archiving effort and intended to be illustrative.

3. Email messages

Here is a little background information on the discussion of the 583 field that will take place during the At-large meeting. This was sent by Constance Malpas of OCLC who will lead the discussion during the meeting
--Les

MARC Field 583

Use for Cooperative Collection Management Trust
- OCLC recommends use of the 042 field as a ready mechanism to retrieve all titles contributed to the collective trust.
- OCLC recommends use of the CCMT 583 field to define the collection management aspects of the institutions contribution, including the following:

$3 Specification of copy (optional).   Copy 1 will be implicit.

$a Level and type of commitment (required). It is recommended that CCMT $a terms be created to cover a range of conditions to avoid having to specify these details in additional 583 subfields. That would facilitate both the use of macros to apply the field or batch uploading by OCLC.

One scenario might be:

Level A = Dark archive copy. Permanent retention, surrogate access only, preservation environment & good condition required. (This might be limited to LC/NLM/NAL participation? Needs further discussion.)

Level B = National copy. Permanent retention, circulating copy, preservation housing & good condition required.

Level C = Use copy. Limited retention (define minimum period?),
circulating copy, no preservation requirements.
$c Date action taken (required).
$l Status (optional). This should be used if additional information is needed to document location or restrictions on access.
$u URL link (optional). Used to direct users to separate documentation. May describe level & type of commitment in greater detail or may describe the nature & services of the storage facility, e.g., layout, operating hours, options for document delivery.

OCLC recommends use of the PDA* 583 field to document the items preservation condition and environment:

$3 Specification of copy (optional).   Copy 1 will be implicit.

$a Preservation action (required, if using a PDA 583). Generally, CCMT will use only 2 PDA actions:
Transferred to optimal storage. This indicates that the storage facility meets preservation standards for temperature & relative humidity.
Condition reviewed. This term indicates that the item has been examined. It is expected that collection management staff rather than preservation staff will be doing this review, with training provided by preservation staff.

$c Date action taken (required).

$l Status (optional). The $l is needed whenever the $a = condition reviewed. For CCMT purposes, the term undamaged indicates that after a condition review, the item was determined to be in good condition. An undamaged item is one in which the text block, the cover, and the text block-to-cover attachment are all intact. The cover may be slightly scuffed, but the paper is not brittle and no content is missing.

$u URL link (optional). Used to direct users to separate documentation. May provide specific information about environmental conditions at the storage facility, e.g., temperature, relative humidity, disaster preparedness.

* More background on preservation terms is available in Preservation & Digitization Actions: Terminology for MARC 21 Field 583 (PDA) (http://www.loc.gov/marc/bibliographic/pda.pdf).
The institution also has the option to add a $x (non-public note) for strictly local use or a $z (public note) to add greater detail in non-standard terms.
The expectation is that most institutions will not have the resources to conduct a condition review, particularly for materials that have already been transferred. It is more probable that a brief condition assessment could occur during the preparation of items for transfer to off-site storage. While the PDA thesaurus includes many more options for condition description, the minimal term undamaged is deemed sufficient for the purpose of identifying it as a national copy so that other institutions may have the confidence to withdraw their surplus copies.
A sample bibliographic record containing examples of 583 field appears at
the end of this paper.
Next steps:
Testing. OCLC will provide the controlled terminology to LC, which will test the work flow, document work load, and verify retrievability of the data.
Thesaurus. OCLC will submit the CCMT thesaurus of terms to the MARC Standards Office to establish the code ccmt in thet 583 $2.

Additional Action Requested
OCLC requests that the CCMT pilot participants provide feedback on their expectations and requirements on use of this field. We are requesting the following feedback:
Will the 583 fields as described be adequate to enable cooperation?
If not, what other information must be represented in the 583 field or MARC record to enable successful cooperation?
We will provide to LC a list of controlled vocabulary terms that must be used for some subfield(s). Does the PDA list cover the needed range of terms to describe conditions of copies and actions related to those copies? Should we identify a subset of those terms for CCMT use? Are there other terms needed specifically for CCMT use?
The 583 field allows an institution to commit at either a Copy-level, a Collection-level, or both. Should the CCMT implement use of copy-level versus collection-level commitments? Both?
Would institutions be interested in a batch upload of this field to indicate commitment and participation?

Proposed Bibliographic Record with 583 Fields

>010   63022268
>040   DLC $c DLC $d OCLCQ $d TSE $d OCL
>019   9772597
>029 1 NLGGC $b 861755170
>042   ccmt
>043   n-us-la
>050 00 GB475.L6 $b M6
>082 4 589.3

>090 $b
>049   OCLC
>100 1 Morgan, James P. $q (James Plummer), $d 1919-
>245 10 Mudlumps at the mouth of South Pass, Mississippi River; $b
sedimentology, paleontology, structure, origin, and relation to deltaic
processes, $c by James P. Morgan, James M. Coleman [and] Sherwood
M. Gagliano. Including appendices by R.D. Adams ... [et al.].
>260   Baton Rouge, $b Louisiana State University Press, $c 1963.
>300   xvi, 190 p. $b illus. $c 28 cm.
>440 0 Louisiana State University studies. $p Coastal studies series ; $v
no. 10
>504   Bibliography: p. [183]-190.
>583 1 $3 Copy 2 $a [Type of commitment terms TBD] $c 20061220
$d?$e? [Length of commitment] $l [Status: off-site storage, circulation
collection] $u [URL link to description of storage conditions, storage
commitment and access level] $2 ccmt $5 DLC
>583 1 $3 Copy 2 $a transferred to optimal storage $c 20061220 $z
Ft. Meade $2 pda $5 DLC
>583 1 $3 Copy 2 $a condition reviewed $c 20070301 $l undamaged $2 pda $5
DLC
>650 0 Mud lumps $z Louisiana $z Mississippi River Delta.
>650 0 Sediments (Geology) $z Louisiana.
>650 7 Sciences $x Philosophie. $2 ram
>700 1 Coleman, James M., $e joint author.
>700 1 Gagliano, Sherwood M., $e joint author.

Notes:
        Field 042 (Authentication Code) provides an indication early in the record that this is one of those
i.e. a Cooperative Collection Management Trust record.
        First 583 field (CCMT Action Note) is intended to convey that the institution has committed at a
specific level to retain and/or provide access to the item for a specified period of time. The Status
subfield is used to indicate location information.
        Second 583 field (PDA Action Note) is intended to convey that the institution has transferred the
item to a facility that has ideal conditions. If the storage facility does not meet preservation standards,
use the CCMT 583 $l instead.
        Third 583 field (Action Note) is intended to convey that the copy has been evaluated and is in
good condition

* [For CONSER representatives especially] What do you see as the key operational obstacle to
recording title-level retention commitments for print serial holdings in the MARC 583 bibliographic record?
Would you endorse its use in CONSER or other cataloging workflows?
* The draft proposal posits 3 levels or types of retention commitment: dark archive; national copy; use
copy. Is it feasible to apply these   retention commitments systematically to whole classes of material in
  your local collections and disclose that commitment in the bibliographic record as part of existing
cataloging/preservation workflows?
* Does your institution manage title-level condition information and/or archiving commitments in MARC
or non-MARC local data that could be mapped to the 583? Would broader network disclosure of such
data from other institutions result in any operational change at your institution

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March 26, 2009

UC San Diego Libraries response on the 583 field and its use for UC Shared Print

This response was formulated through discussion at the March 9 Cataloging Committee meeting, and responses to a subsequent draft document. UC San Diego Libraries staff had several concerns:

(1) **The field is too complex.** This does not appear to us to be a "lightweight" solution. There are massive amount of administrative metadata proposed to be encoded here. These data are not of interest to the users (and the field presumably would be suppressed from public display), but are meant for backend library staff. Even so, the field is quite confusing. Our group felt that the 583 would be very complicated to code: some subfields are free text, some are controlled vocabulary. This field must be made simpler; if coding is too complex, people will not use it. We strongly urge streamlining and simplification.

(2) **There could potentially be too many 583 fields in a record.** Coding multiple fields to describe what an institution intends to do, and then does, clutters the record far too much. What is workflow data, or project management data doing in the MARC record? We encourage making the $a repeatable or "overwritable" so that an institution could adjust/overwrite its **one** 583 when actions are taken. As time goes on and more institutions become involved with print archiving (and as your example shows), there is the potential for having 583 fields from multiple institutions in a record. As holdings are in bits and pieces, the record also will become longer and more complex. It is unnecessary proliferation, as well as confusing and possibly misleading, to have each institution potentially have multiple 583 fields to record various steps in their workflow. We know that storing this data in the Local Holdings Record has been proposed, and encourage continuing to look at this technique as a possible solution.

In conjunction with the idea of making $a repeatable, we suggest that the $3 should also be repeatable along with the $a. Institutions would likely have different actions based on different parts of the whole; it would be nice to centralize all that within one 583. Multi-part monographs are a specific example of when this might be useful. The $a's and $3's might need to be paired so the relationship between the two are clear.

(3) **Clarity needed about use in multiple, related records.** Maybe we missed this somewhere in the documentation, but it was unclear to us whether libraries would be expected to code this field on the print record (for the material being archived), on the record for a digitized version (users/librarians might be interested to know that archived print existed), or both.

(4) **Need for Preservation and Digitization Actions information in local ILS.** Several staff members suggested that libraries should be encouraged NOT to export 583 fields into their local ILSs but to use OCLC as the only source for ascertaining these preservation commitments and information. The data in this use of the 583 field is potentially quite volatile, and so the copies in local ILSs could quickly go out of date. However, excluding this field could be a tricky (and perhaps impossible) implementation, since there are other uses for this field that could be desirable in a local ILS. One could make the case for keeping Preservation and Digitization Actions information for one's own institution in that ILS, but extending that to other institutions might be overwhelming and unnecessary.

…

Subject: MARC 583 for print archiving

Colleagues,

I'm writing to provide you with an update on our ongoing efforts to identify a lightweight disclosure mechanism to support libraries participating in distributed print archiving efforts. Some of you will be aware that we are considering the MARC 583 Action Note as a potential vehicle for disclosing institutional print archiving commitments. In January 2009, we shared a draft version of guidelines for this use of the MARC 583 tag with a group of collection managers, preservation administrators and serials catalogers and hosted a phone meeting to discuss the feasibility of extending these guidelines (originally limited to monographic titles) to support print archiving of the serial literature. Following that call, we held a series of meetings in conjunction with ALA Midwinter to raise awareness of this project and to solicit feedback from key stakeholders.

As a result of these preliminary consultations, we have substantially revised the original guidelines and are now seeking further input from the library community to improve the document. To make this process as transparent as possible, and support distributed contribution to the editing process, we have made the revised guidelines available as a Google document. You may access it here: http://docs.google.com/Doc?id=dc2djpm6_46cbq4kfgd&invite=rj3mmv We invite you to read and comment on the draft and revise it as you see fit. Please be aware that while anyone may view the document using this link, only those with Google Docs or Gmail accounts can edit the content. (Google Docs accounts are available to anyone and require less than a minute to create.) This is necessary to manage the editorial process. Each change to the document is automatically logged and saved as a revision, so the usual caveats and concerns about version control should not apply here. We encourage you to make whatever changes to the text you think are needed. The document will remain open to revision until the end of March 2009.

At the end of this process, we would like to have established a minimum set of terms to be used in conjunction with the MARC 583 tag to enable increased library cooperation in distributed print archiving efforts. We believe a modest extension to the existing *Preservation & Digitization Actions: Terminology for MARC 21 Field 583* and the creation of a new 042 source code to distinguish print archive registry records will suffice to provide the core infrastructure that is required. Our goal is implement the necessary changes within the WorldCat cataloging and collection management environment to support these changes by mid year.

Please feel free to share this message with interested colleagues.   And let me know if you run into problems with (or have objections to) this use of Google Docs. This is something of an experiment for us, so your patience is appreciated!

Many thanks,
Constance Malpas
OCLC Research